Market Assessment of Interactive Video
Training in The Data Processing Marketplace

Y-AIW   March 1984

Y-AIW
1984

MARKET ASSESSMENT
OF
INTERACTIVE VIDEO TRAINING
IN THE
DATA PROCESSING MARKETPLACE

PHASE 2
OF A
CUSTOM RESEARCH STUDY

BY
INPUT

MARCH 7, 1984

AGENDA

- REVIEW OF PHASE I.

- OBJECTIVES OF PHASE 2.

- METHODOLOGY.

- RESULTS.

- ACTION ITEMS.

REVIEW OF PHASE I

- OBJECTIVES

    - ASSESS PRODUCT VIABILITY.

    - IDENTIFY USER REQUIREMENTS.

- METHODOLOGY

    - DEMONSTRATION/INTERVIEWS.

    - SEVEN COMPANIES.

REVIEW OF PHASE I - (continued)

- RESULTS.

    - ENGAGING PRODUCT.

    - BUT, CONCERNS...

        . INTIMIDATING SYSTEM.

        . SCORING INFORMATION.

        . PRICE.

        . ABILITY TO CUSTOMIZE.

- ISSUES.

    - TAILORING.

    - SCORING.

    - POSITIONING.

    - OFFERINGS.

    - PRICING.

SCOPE OF PHASE 2

- PRODUCT ASSESSMENT.

- PERCEIVED VALUE VIS-A-VIS TRAINING NEEDS AND COMPANY REVENUE.

- PRICE ELASTICITY OF LEASE OPTIONS.

- IMPACT OF STRATEGIES ON VALUE.

    - LEARNER OPTIONS.

    - INSTRUCTOR MANAGEMENT.

    - INFORMATION ON RESULTS.

    - ON-SITE CUSTOMIZATION.

METHODOLOGY

- DEVELOPED QUESTIONNAIRES.

  - ALTERNATIVE PRODUCT OR PRICING SCENARIOS.

  - IMPACT OF SCENARIOS ON PRICING.

- MADE APPOINTMENTS.

- CONDUCTED DEMONSTRATION/INTERVIEW.

- ANALYZED RESULTS.

- PRESENTATION.

INTERVIEWS

- ARTHUR ANDERSEN

- CHICAGO DATA PROCESSING EDUCATORS

    - ILLINOIS BELL.

    - ALLSTATE.

    - STANDARD OIL OF INDIANA.

- CNA.

- FEDERAL RESERVE BANK.

- GIANT FOOD.

- INTERNAL REVENUE SERVICE.

- UNITED AIRLINES

- FIRST NATIONAL BANK OF CHICAGO.

OTHER INTERVIEWS

- TELEPHONE, RECENT DEMONSTRATION.

    - GEISCO.

    - AETNA LIFE AND CASUALTY.

- ON-SITE, NO DEMONSTRATION.

    - ABBOTT LABORATORIES.

REJECTIONS

ALLIED - VERY LITTLE DP.

BEATRICE FOODS - NO DP TRAINING

COMMONWEALTH EDISON - NO DP TRAINING

CONSOLIDATED FOODS - NO DP TRAINING

COOPERS & LYBRAND - NO FUNCTION

E.C. ERNST - TOO BUSY

ESMARK - NO DP TRAINING

GOVERNMENT EMPLOYEES INSURANCE COMPANY (GEISCO) -
    VERY NEW TRAINER

ILLINOIS CENTRAL INDUSTRIES - LITTLE DP TRAINING

MARRIOTT - VERY SMALL TRAINING FUNCTION (ONE PERSON)

NORTHWEST INDUSTRIES - NOT GOING IN THIS DIRECTION

ORTHO DIAGNOSTICS/JOHNSON & JOHNSON - NO DP TRAINING

RAND McNALLY - NO DP TRAINING

SEARS, ROEBUCK - INTERESTED BUT TOO BUSY

TOUCHE ROSS - NO DP TRAINING

U.S. AIR - JUST GETTING INTO CBT WITH DELTAK

ISSUES - PRODUCT ASSESSMENT

- GENERAL REACTION.

  - "BEST SYSTEM I'VE SEEN."

  - "BETTER THAN PHOENIX."

  - "BETTER THAN WATCHING DELTAK."

- SUGGESTED ENHANCEMENTS.

  - USER EXIT TO OPERATING SYSTEM.

  - COMPUTER TEXT ON VIDEO.

  - ANIMATION CAPABILITY.

  - COLLECT STUDENT RESULTS ON MAINFRAME.

ISSUES – PRODUCT ASSESSMENT – (continued)

- CONCERNS.

    - DELIVERY TO BRANCH OFFICES.

    - DELIVERY TO WORKSTATION WITHOUT

        MORE HARDWARE.

    - ADDED VALUE OF SOME VIDEO?

    - "PUNITIVE" NATURE OF SCORING.

PERCEIVED VALUE AND TRAINING NEEDS
QUALITY OF CONTENT

	LIVE	IVT
• "FIT" WITH COMPANY'S TECHNICAL NEEDS.	1	2
• MATCH WITH STUDENTS' NEEDS.	2	1
• CONTRIBUTION TO JOB PERFORMANCE.	2	1
• MATCH WITH STUDENTS' ABILITIES.	2	1
• CURRENCY OF INFORMATION.	1	2
• ACCURACY OF INFORMATION.	1	1
• TOPICS COVERED.	2	1

PERCEIVED VALUE AND TRAINING NEEDS
QUALITY OF PRESENTATION

	LIVE	IVT
● ABILITY TO MEET STUDENT NEEDS	2	1
● AMOUNT OF STUDENT CONTROL	2	1
● EXTENT OF INTERACTIVITY	1	2
● STUDENT RETENTION	1	2
● PACE OF INSTRUCTION	2	1
● PROVEN EFFECTIVENESS	1	?
● TIME SPENT IN TRAINING	2	1
● FLEXIBILITY OF PRESENTATION	1	2
● USE AS A SUPPLEMENT OR REFRESHER	2	1
● VARIETY OF INSTRUCTIONAL FORMATS	2	1
● USE OF TRAINING TECHNOLOGY	2	1

PERCEIVED VALUE AND TRAINING NEEDS
EASE OF ADMINISTRATION

		LIVE	IVT
●	AVAILABILITY OF COURSE.	2	1
●	ABILITY TO CUSTOMIZE.	1	1
●	VOLUME OF STUDENT THROUGHPUT.	1	?
●	EASE OF COURSE MANAGEMENT.	1	2
●	EXTENT OF FEEDBACK TO INSTRUCTOR.	2	1
●	PRIOR EXPERIENCE WITH MATERIALS.	2	1

PERCEIVED VALUE AND TRAINING NEEDS
COST OF COURSE

	LIVE	IVT
● COST/EFFECTIVENESS OF COURSE.	1	?
● EQUIPMENT COSTS.	1	2
● INSTALLATION (DEVELOPMENT) OF COURSE.	2	1
● COURSE PRESENTATION COSTS.	2	1
● TERMS AND CONDITIONS.	1	2

PERCEIVED VALUE AND LEARNER OPTIONS

- RESPONDENTS AGREE THAT THE VARIETY OF OPTIONS IS NECESSARY BUT MAY BE THE SOURCE OF INITIAL CONFUSION.

- SOLUTIONS.

    - SOLID FRONT-END TRAINING/DOCUMENTATION.

    - SOFTWARE TO THROTTLE OPTIONS.

PERCEIVED VALUE AND CUSTOMIZATION

- USERS THINK THEY HAVE UNIQUE NEEDS. CUSTOMIZATION OPTIONS PROVIDE A SOLUTION TO THIS FELT NEED.

  - MOST AGREE THAT LITTLE CUSTOMIZATION WILL BE DONE. BEYOND ADDING/DELETING TEXT SCREENS.

  - SOME VENDORS ARE TRYING TO INCREASE THIS NEED.

- UNLIKELY THAT USERS WILL PAY MUCH FOR THIS CAPABILITY.

- SOLUTION.

  - OFFER A TEXT SCREEN GENERATE AND INSERT UTILITY FOR A SMALL ADDITIONAL COST.

PERCEIVED VALUE AND STUDENT RESULTS

- MOST AGREE THIS INFORMATION IS AN AID TO LEARNING.

    - SOME FEAR IT IS A THREAT THAT IMPEDES LEARNING.

- IS THE RESPONSIBILITY OF THE COMPANY TO FOLLOW PROPER TESTING AND TEST INFORMATION PROCEDURES.

- SOLUTION.

    - BE PREPARED TO REMOVE PERFORMANCE MEASURES FOR SOME COMPANIES.

TERMS AND CONDITIONS
SERVICE

- ITS SERVICE SCENARIOS ARE GOOD.

- USERS "EXPECT" THIS SERVICE SO THEY MAY REACT TO A SERVICE CHARGE.

- SOLUTION.

  - MAY BE BEST TO BUNDLE IT AND OFFER "FREE" SERVICE.

TERMS AND CONDITIONS
ACQUISITION OF EQUIPMENT

- COMPANIES HAVE MICROCOMPUTER STANDARDS WHICH THIS CONFIGURATION MEETS.

  - XTs ARE POPULAR.

- CAPITAL PURCHASES REQUIRE CORPORATE APPROVAL AND JUSTIFICATION.

  - APPROVEL MAY NOT BE REQUIRED FOR SINGLE STATIONS PURCHASED OUT OF A TRAINING MATERIALS BUDGET.

  - TRIAL ARRANGEMENTS WOULD WORK THIS WAY.

- COMPANIES HAVE CORPORATE DISCOUNTS WITH IBM.

  - WILL PURCHASE PC AND COURSEWARE UNBUNDLED.

TERMS AND CONDITIONS
ACQUISITION OF EQUIPMENT - (continued)

- APPEARS TO BE A ROADBLOCK FOR SOME COMPANIES.

    - REQUIRES JUSTIFICATION AND PROOF OF EFFECTIVENESS.

- SOLUTIONS.

    - TARGET COMPANIES WITH INSTALLED BASE.

    - DEVELOP COST JUSTIFICATION EVIDENCE.

TERMS & CONDITIONS
LEASE

- COURSE LEASING IS FAMILIAR AND ACCEPTABLE.

- HOWEVER, TRAINERS EXPECT COURSES TO BE MAINTAINED AND UPGRADED.

- SOLUTION.

  - EXPLAIN PURPOSE OF LEASE.

  - CONVINCE COMPANIES OF PLANS TO MAINTAIN COURSES.

PRICING

- REACTION TO SCENARIOS DEPENDS...

    - $100 + LOOKS GOOD IF LIVE BUDGET IS LARGE.

    - $80-100 IS HIGH IF PASSIVE VIDEO IS USED EXTENSIVELY.

- IN GENERAL, $100 - 120/MODULE IS OK.

- SOLUTION.

    - BE PREPARED TO DEAL WITH COMPANIES ON AN INDIVIDUAL BASIS.

TERMS & CONDITIONS
DISCOUNTS

- TOO NEW TO COMMIT TO QUANTITIES.

- MOST WILL START WITH I STATION.

- QUANTITY DISCOUNTS WOULD NOT BE ATTRACTIVE NOW.

- SOLUTION.

  - OFFER DISCOUNTS FOR THOSE WHO BUY IN QUANTITY
    BUT DON'T USE A SALES STRATEGY.

  - OFFER A BUY-IN FOR FUTURE DEVELOPMENT.

PERCEIVED VALUE
CONCLUSIONS

- VALUE OF ITS PRODUCT IS HIGH...

    - COMPARED TO GOALS.

    - COMPARED TO ALTERNATIVES.

- NO ISSUE SUBTRACTS SIGNIFICANTLY FROM VALUE.

- HOWEVER...

PERCEIVED VALUE
CONCLUSIONS - (continued)

- NO PREMIUM ON EFFECTIVENESS FROM MIS.

- THROUGHPUT IS IMPORTANT.

- "EXPOSURE" IS MAJOR CRITERION.

  - LIVE IS PERCEIVED AS MOST EFFECTIVE.

  - PASSIVE VIDEO IS PERCEIVED AS LEAST EXPENSIVE.

- DESIRE IS FOR A PRODUCT...

  - AS EFFECTIVE AS LIVE...

  - AT THE COST OF VIDEO.

PERCEIVED VALUE
CONCLUSIONS - (continued)

- ONLY REMAINING TURF...

  - MORE EFFECTIVE THAN VIDEO.

  - LESS EXPENSIVE THAN LIVE.

  - MORE EFFICIENT THAN EITHER.

ACTION ITEMS

- ESTABLISH A LIBRARY OF COURSES.

    - JOINT DEVELOPMENT ARRANGEMENTS.

    - EXISTING VENDORS.

        . DOWN PLAY ASSOCIATION.

        . CONSIDER END USER VENDORS.

- ENSURE ADDED VALUE OF VIDEO.

ACTION ITEMS - (continued)

- DEVELOP CUSTOMIZATION OPTIONS.

    - FULL CUSTOM TRAINING SERVICE.

    - COMPLETE AUTHORING CAPABILITY.

    - LIMITED AUTHORING CAPABILITY.

- DEVELOP LIMITED RESULTS VERSIONS.

    - SOFTWARE SOLUTION TO SELECT OPTIONS.

ACTION ITEMS – (continued)

- DEVELOP RESPONSE TO DELIVERY MACHINE ISSUE.

    - USE WITH EXISTING WORKSTATION.

        . BEST TO LEARN CONCEPTS IN LEARNING ENVIRONMENT.

        . BENEFIT OF VIDEO.

    - USE IN BRANCH LOCATIONS.

        . FACILITATIVE PACKAGING.

        . CONSISTENCY OF CONTENT.

        . NETWORKS

- PRICING.

        . DEVELOP SALES TOOLS FOR EXPLAINING PRICES OF ALTERNATIVES.

        . DEVELOP ALGORITHM FOR EFFICIENCY INDEX.

TRAINING OVERVIEW - ABBOTT LABORATORIES

- DP TRAINING.

  - 350 MIS EMPLOYEES PLUS RESPONSIBILITY FOR END USERS.

  - $1.5 M TRAINING BUDGET.

    - 750 EMPLOYEES TRAINED PER YEAR.
    - $150K SPENT IN OUTSIDE TRAINING.

  - TRAINING APPROACHES.

    - 80% LIVE.

    - DELTAK CONTRACT BUT DON'T LIKE MATERIALS.
    - HAVE USED PLATO.

  - REACTION.

    - VERY INTERESTED IN INTERACTIVE VIDEO BUT HAVE NOT SEEN ANYTHING THEY LIKE.
    - TRAINING SHOULD BE DELIVERED VIA WORKSTATION.
    - INTEREST IN MAINFRAME-BASED SYSTEM.

- POTENTIAL: HIGH.

TRAINING OVERVIEW - ARTHUR ANDERSEN

- PROFESSIONAL TRAINING CENTER.

  - 23K EMPLOYEES TRAINED PER YEAR.
  - 650 TRAINING EMPLOYEES.
  - 28 VIDEO PRODUCTION EMPLOYEES.
  - VERY ACTIVE IN ALTERNATIVE DELIVERY SYSTEMS.

  - 1500 IBM-PCs INSTALLED AND WILL DOUBLE IN TWO YEARS.
  - LARGE NEED FOR END USER AND OFFICE AUTOMATION TRAINING.

- REACTION.

  - VERY IMPRESSED WITH SYSTEM.
    - GOOD GRAPHICS.
    - "EXPERT SYSTEM" FOR RESPONSE JUDGING.
  - WOULD LIKE TO SEE:
    - ANIMATION CAPABILITY.
    - FASTER PACED MATERIAL.
    - COURSES RELATED TO PROJECT MANAGEMENT.
    - PURCHASE AGREEMENT RATHER THAN LEASE.
    - COMPUTER TEXT ON VIDEO.
    - USER EXIT TO DOS.

- POTENTIAL: VERY GOOD FOR CUSTOM.

TRAINING OVERVIEW - CNA INSURANCE

- DP TRAINING.

    - 600-800 STUDENTS/YEAR TAKING 40 COURSES.
    - $250K BUDGET, INCLUDING 8 TRAINERS.
    - 50% LIVE.
    - SOME IIS FOR INSURANCE COURSES.
    - $50K SPENT ON COURSES. 50% TO DELTAK. SAS VIDEO USED.
    - STILL IN A REACTIVE MODE.
    - VERY UNHAPPY WITH CURRENT VIDEO BECAUSE OF QUALITY.

- REACTIONS.

    - "HAS POTENTIAL TO BE BETTER THEN LIVE."
    - GOOD INTERACTIVITY AND RESPONSE TIME.
    - APPROPRIATE FOR MANY COURSES BUT VIDEO MUST ADD SOMETHING.
    - MUSTCOLLECTSTUDENTINFORMATIONONMAINFRAME.

- POTENTIAL.

    - FAIR.
    - MUST SHOW BENEFITS.
    - WOULD NEED A "STARTER SET" PRICING STRUCTURE.

TRAINING OVERVIEW – FEDERAL RESERVE

- DP TRAINING.

    - 60% LIVE. END USER TRAINING IS ALL LIVE.

    - PLANS TO PROPOSE IIS OR PHOENIX IN 1984.

        . WANTS A MAINFRAME SYSTEM BECAUSE OF NETWORK.

        . OFFICE AUTOMATION GROUP HAS 50 IBM-PCs

    - LARGE EDUTRONICS USER.

- REACTION.

    - "VERY NICE." "BEST SYSTEM I'VE SEEN."
    - MUST BE GEARED TO ACTUAL SYSTEMS IN USE.
    - WOULD WANT TO CUSTOMIZE SOME COURSES.
    - GOOD FOR RECORDKEEPING.
    - NOT A GOOD SYSTEM FOR ADVANCED COURSES BECAUSE OF VOLUME AND PACE.

- POTENTIAL.

    - FAIR. NEED TO SHOW ADVANTAGES OVER MAINFRAME CBT.

    - EXPENSE OF EQUIPMENT MAY BE A PROBLEM.

TRAINING OVERVIEW – GIANT FOODS

- TRAINING ORGANIZATION

    - I DP TRAINER FOR STAFF OF 300 DP.
        - $100K BUDGET.
        - 60% LIVE.
        - USES DELTAK AND ASI.
        - IS TRYING PHOENIX ($250/MO.).

    - CORPORATE TRAINING HAS RESPONSIBILITY FOR ALL ASPECTS OF SUPERMARKET TRAINING (POS TERMINALS, DISPLAY, SERVICE)

- REACTION.

    - MUST HAVE A GOOD MANAGEMENT SYSTEM WITH ABILITY TO CONTROL FLOW OF COURSES.
    - "BETTER THAN PHOENIX."
    - REQUIRES ADDITIONAL HARDWARE THAT IS HARD TO GET APPROVED.
    - PRICE ($120) IS TOO HIGH.
    - PROVIDING TEST INFORMATION IS A PLUS.

- POTENTIAL.

    - VERY GOOD, ESPECIALLY FOR CUSTOM TRAINING IN CORPORATE.

TRAINING OVERVIEW - INTERNAL REVENUE SERVICE

- TRAINING.

    - ALL TRAINING IS CENTRALIZED.

    - USE PLATO, IIS, ACCESS (UNIVAC).

    - EDUTRONICS CUSTOMER.

- REACTION.

    - NOT SURE OF COST EFFECTIVENESS.

    - SOME CUSTOMIZATION IS NECESSARY.

    - VIDEO MUST ADD SOMETHING.

    - NO NEED FOR SCORING INFORMATION.

- POTENTIAL.

    - UNKNOWN, BUT A LARGE ORGANIZATION.

    - NEED A SYSTEM TO TRAIN AT BRANCH OFFICES.

    - GOOD POTENTIAL FOR CUSTOM.

TRAINING OVERVIEW – STANDARD OIL OF INDIANA

- DP TRAINING.

  - 100 COURSES TAKEN BY 5,000 STUDENTS.
  - $1.4M BUDGET WITH 10 TRAINEES.
  - 80% LIVE.
  - $50K SPENT ON PURCHASED/LEASED COURSES.

- REACTION.

  - IMPRESSED WITH SYSTEM, BETTER THAN VIDEO.
  - TOO EXPENSIVE BECAUSE OF HARDWARE.
  - MUST HAVE A GOOD LIBRARY.
  - MUST SHOW BENEFIT OF INTERACTIVITY.
  - VIDEODISKS WILL BE A PROBLEM UNTIL THEY CAN RECORD.
  - "BECAUSE IT'S TWICE AS EXPENSIVE, IT MUST BE FOUR TIMES AS GOOD" TO BE CONSIDERED.
  - CUSTOMIZATION AND SCORING INFORMATION AND GOOD FEATURES.

- LOW BECAUSE OF COST.

TRAINING OVERVIEW - UNITED AIRLINES

- DP TRAINING.

    - THREE GROUPS (SYSTEMS, OPERATIONS, END USERS) WITH SEPARATE TRAINERS. (0, 11, 3 RESPECTIVELY).
    - MOSTLY LIVE, BUT SOME VIDEO AND CAI (IIS).
    - VERY FEW PCs USED IN TRAINING.

- REACTIONS.

    - "BETTER THAN WATCHING DELTAK."
    - "VERY INTERESTING PRODUCT."
    - SCORING IS TOO DETAILED AND PUNITIVE, BETTER TO ENCOURAGE, STORE ONLY AGGREGATE INFORMATION.

- POTENTIAL.

    - LOW BECAUSE OF HARDWARE REQUIREMENTS (FINANCIAL AREAS ARE GETTING ALL THE PCs).
    - INTEREST IN CUSTOMIZATION.
    - WOULD WANT 30 DAY FREE TRIAL.

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